The background of the slide is a composite image. On the left, a large satellite dish is shown in a dark, blue-tinted overlay. On the right, a vibrant cityscape at dusk or dawn is visible, with numerous skyscrapers and buildings illuminated by city lights. The sky is a mix of blue, orange, and white.

# Kenya Media Landscape Report 2022

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- ☐ Top topics on main mainstream media.
- ☐ Most covered personalities and companies
- ☐ Advertising Trends (TV, Radio, print and OOH)

# Executive Summary



**1**

**80% of Media Consumers watched TV in 2022.**

**2**

**Citizen TV and Radio Citizen attracted highest audience on TV and radio respectively.**

**3**

**Politics was the prominent news item across the media in 2022.**

**4**

**Most Kenyans access internet via mobile phones.**

**5**

**Advertising expenditure across mainstream media in 2022 increased by 4% with Betting & Gambling accounting for the largest share.**

**6**

**OOH Advertising expenditure in 2022 decreased by 23%; Beverages and Finance top spenders on this platform.**





# Media Consumption Trends (2022)

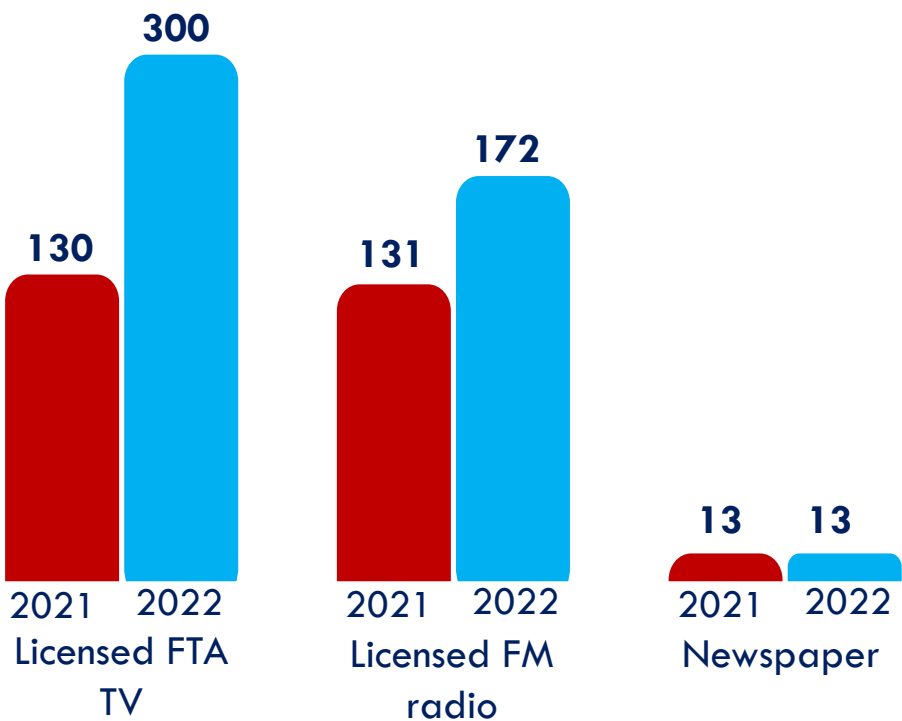


300

No. of Free to Air TV Channels

Massive increase in number of TV channels in 2022 was is driven by availability of more stations, consumed on various platforms – from the set-top-box and online.

No. of Media outlets



Source: Communication Authority

# Media Consumption Habits

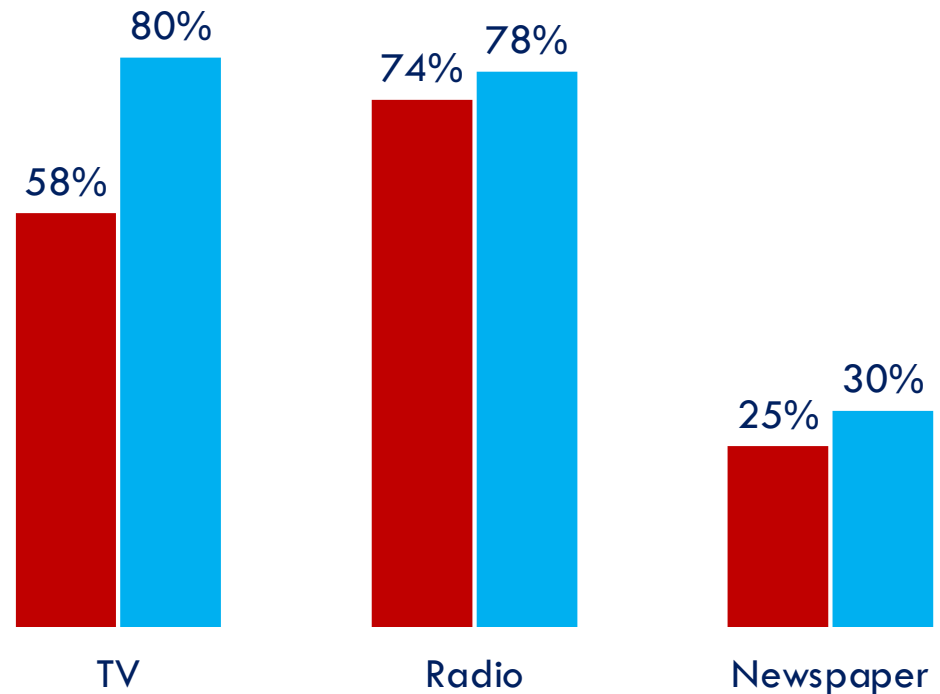
# 80%

of media consumers in Kenya  
watched TV

**TV was the most consumed media in 2022, due to General Elections coverage and 2022 Qatar FIFA World Cup that were held in the year.**

## Media Consumption

■ 2021 ■ 2022



Source: Media Council of Kenya

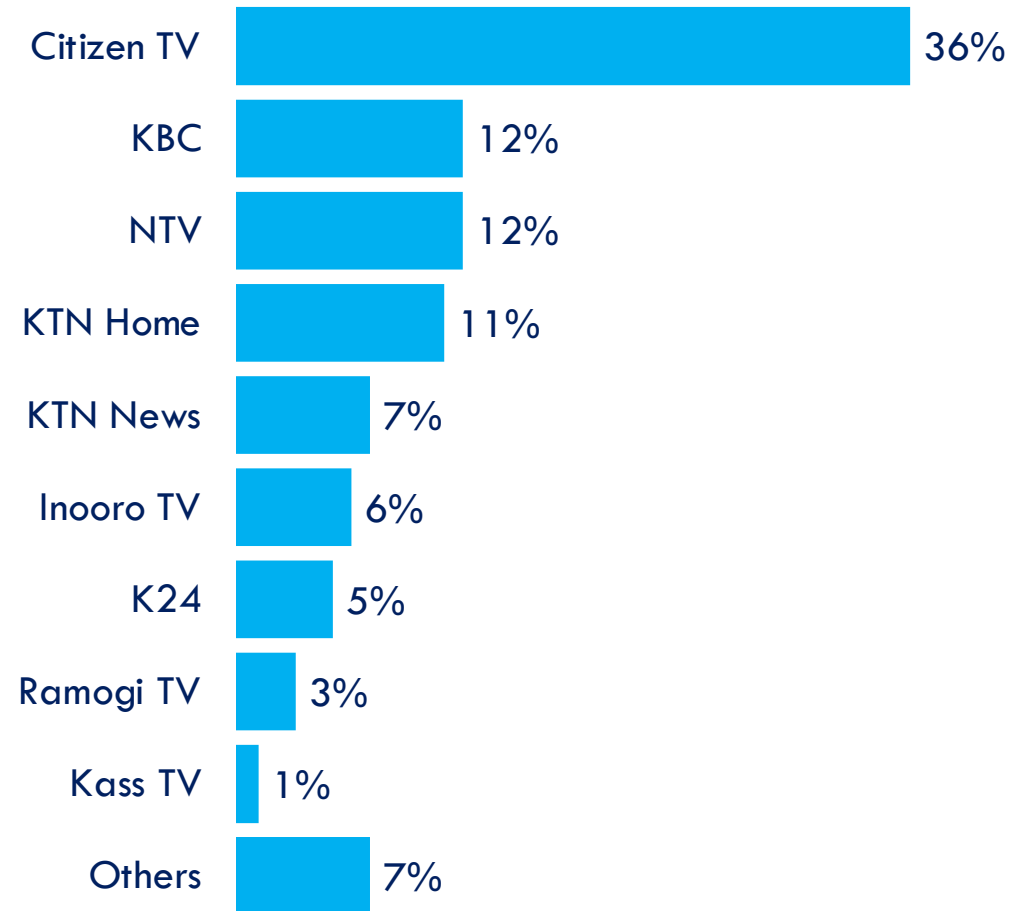
# TV Viewership

# 36%

of TV viewers watched Citizen TV

**Citizen TV was the most watched channel in 2022; This viewership was attributed eye-catching programs across the week, target all age groups.**

## TV Viewership Share by Channel



Source: Media Council of Kenya

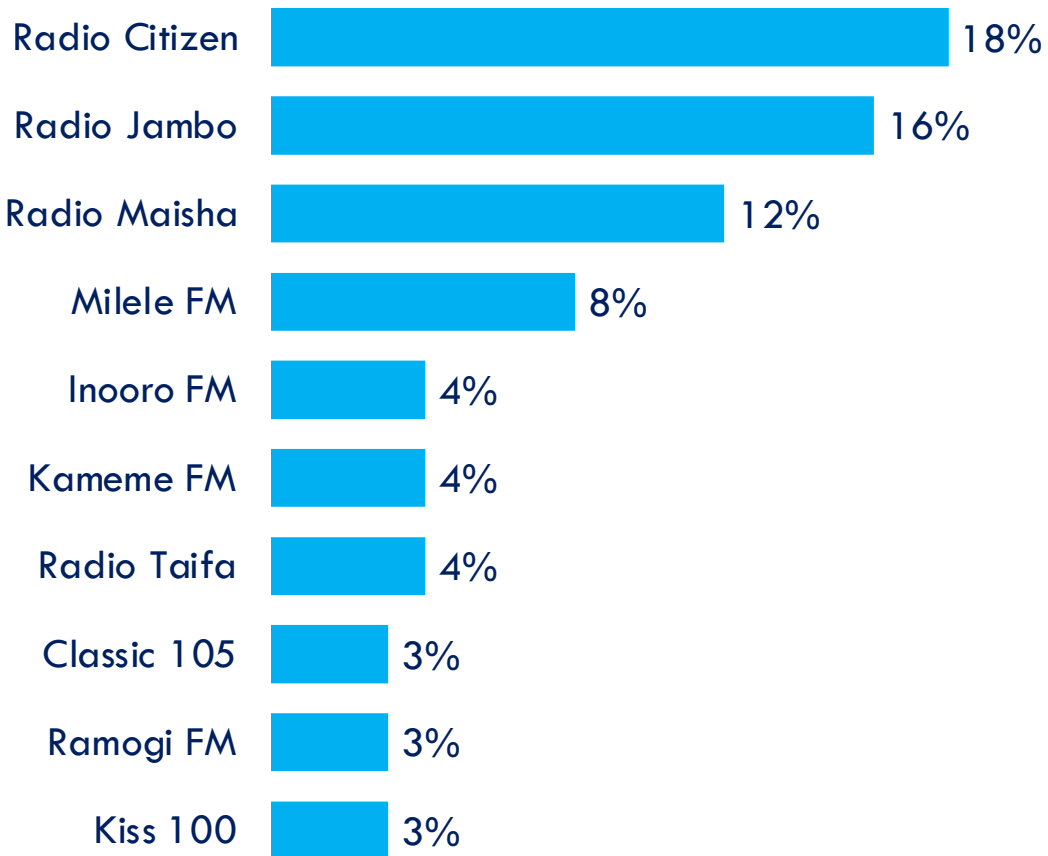
# Radio Listenership

# 18%

of radio listeners tuned to Radio Citizen

**The top four radio stations' audience peak was during breakfast shows, this was mostly linked to the presenters during these shows.**

## Radio Audience by Station



*Source: Media Council of Kenya*



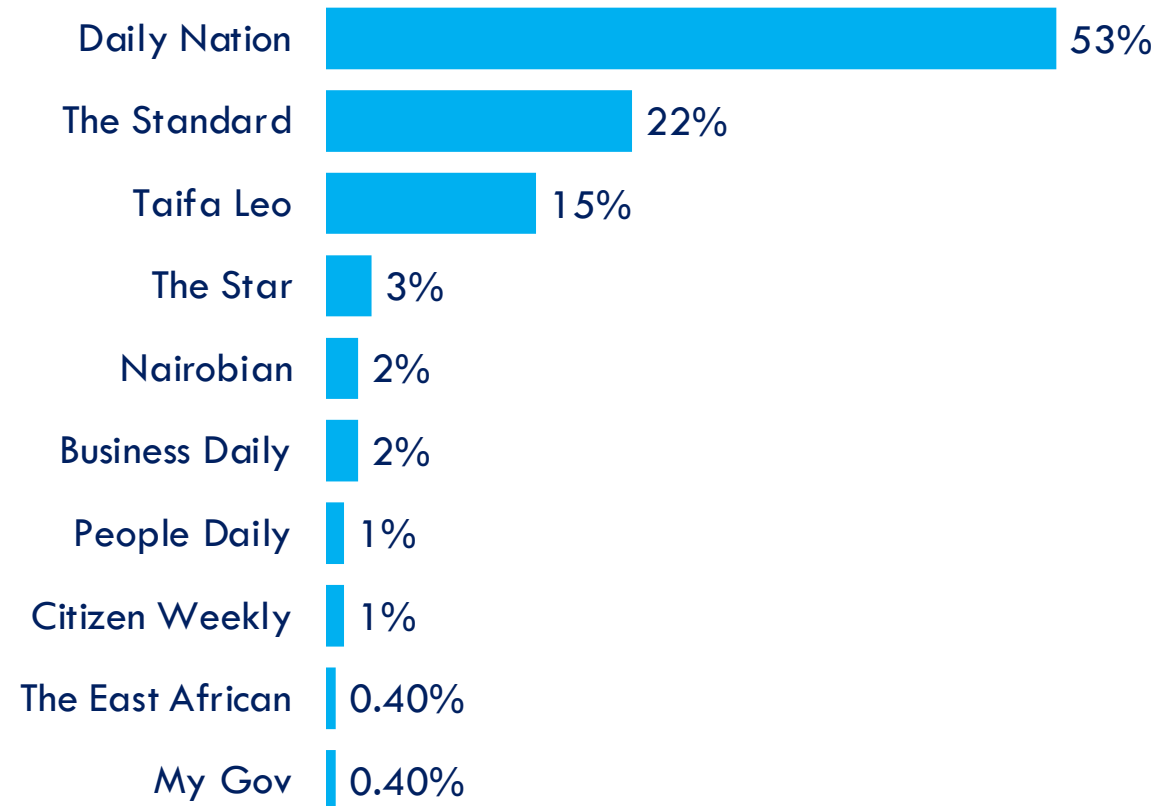
# Newspaper Readership

# 53%

of print consumers read Daily Nation.

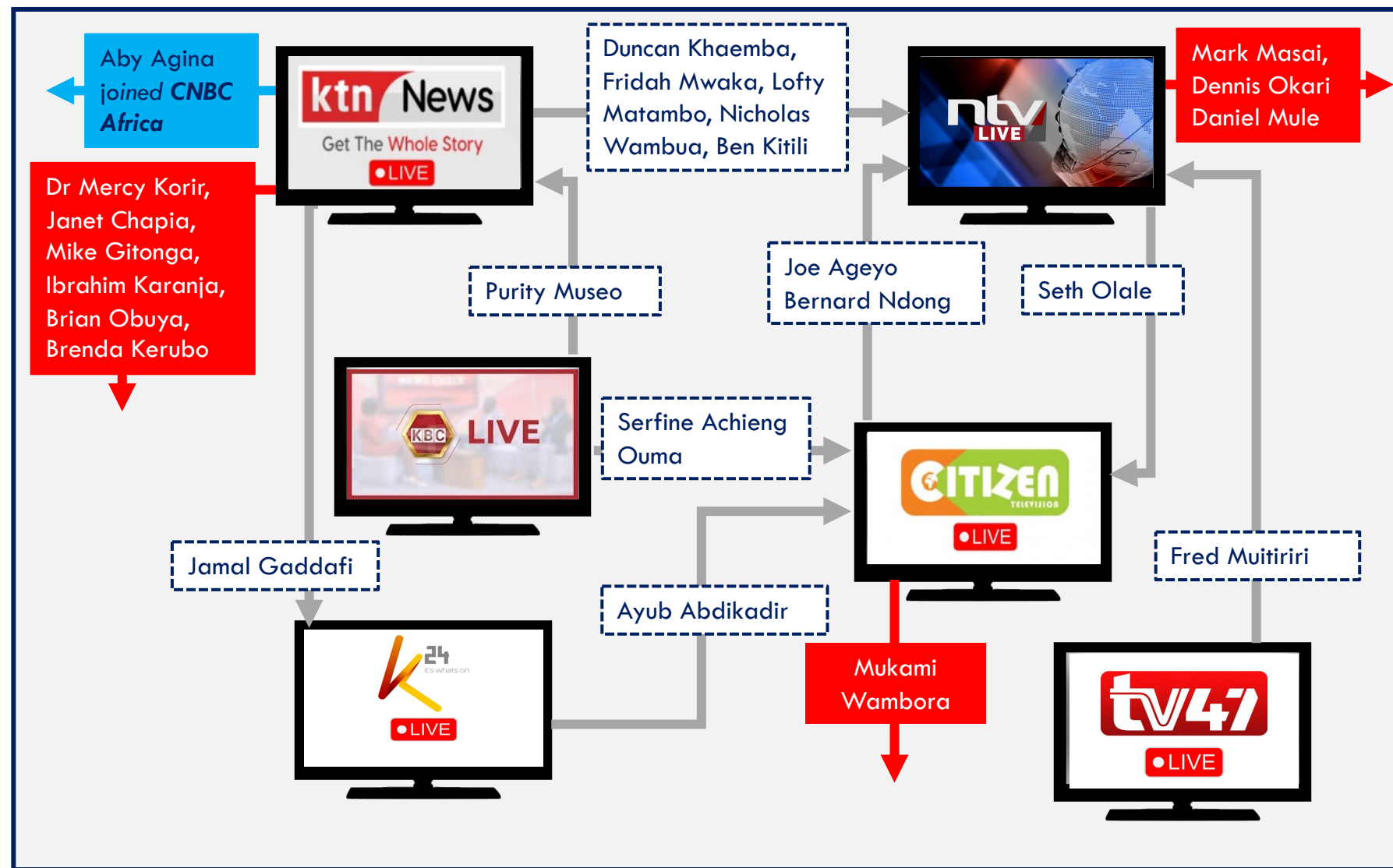
**High readership on Daily Nation was mainly attributed different editions targeting eight regions of the country (i.e. Mt. Kenya, Western, Rift, Coast, Nyanza among others).**

## Newspaper Readership



*Source: Media Council of Kenya*

# Presenter Movement (TV)





# Editorial Content:

## Main News Items



# Major Publicity highlights in 2022

## BBI final verdict

The Supreme Court declared the Building Bridges Initiative (BBI) process as irregular, illegal and unconstitutional.



February 24<sup>th</sup>



## Russia and Ukraine War

Russia invaded Ukraine in a major escalation of the Russo-Ukrainian War, which has affected most economies across the world.

March 31<sup>st</sup>



## President Mwai Kibaki died

Kenya's third president, Mwai Kibaki, passed away at the age of 90 years

April 21<sup>st</sup>

## First female Chief Justice

Justice Martha Karambu Koome was sworn in as the first woman to become Chief Justice and Head of Kenya's Judiciary.



May 20<sup>th</sup>



## General Election

HE President William Ruto was elected as Kenya's 5th President. Also elected were governors, senators, MPs, women representatives and MCAs.

August 8<sup>th</sup>

## Kipchoge set Marathon record

Eliud Kipchoge set a new World Marathon record (2:01:09) at Berlin Marathon.



September 25<sup>th</sup>



## FIFA World Cup

FIFA World Cup was held in Qatar from Nov 21st to Dec 18th. Argentina won the tournament.

November 21<sup>st</sup>

# Digital Media Trends



# Devices Used to Access the Internet (Kenya)

# 75.6%

Internet subscribers access internet through mobile phone.

---

High internet access through mobile phones was majorly attributed to increased mobile penetration currently at 65.5 million translating to a mobile (SIM) penetration level of 132.5%.



## 75.6%

mobile devices



## 23.4%

laptops and desktop computers













## 0.9%

tablets



# Most Visited and Popular Websites in Kenya (2023) reelanalytics

Site	Monthly visits	Affinity	Ranking
 nation.africa	14.1M	87%	#755
 tuko.co.ke	7.8M	83%	#1,254
 the-star.co.ke	5.8M	100%	#1,67
 standardmedia.co.ke	5.2M	97%	#1,72
 kenyans.co.ke	4.5M	50.4%	#19,945
 businessdailyafrica.com	2.6M	93%	#2,956
 citizen.digital	2.3M	81%	#3,843
 theeastafrican.co.ke	646.6K	83%	#7,708
 capitalfm.co.ke	616.2K	94%	#8,084
 pulselive.co.ke	443.0K	91%	#9,915

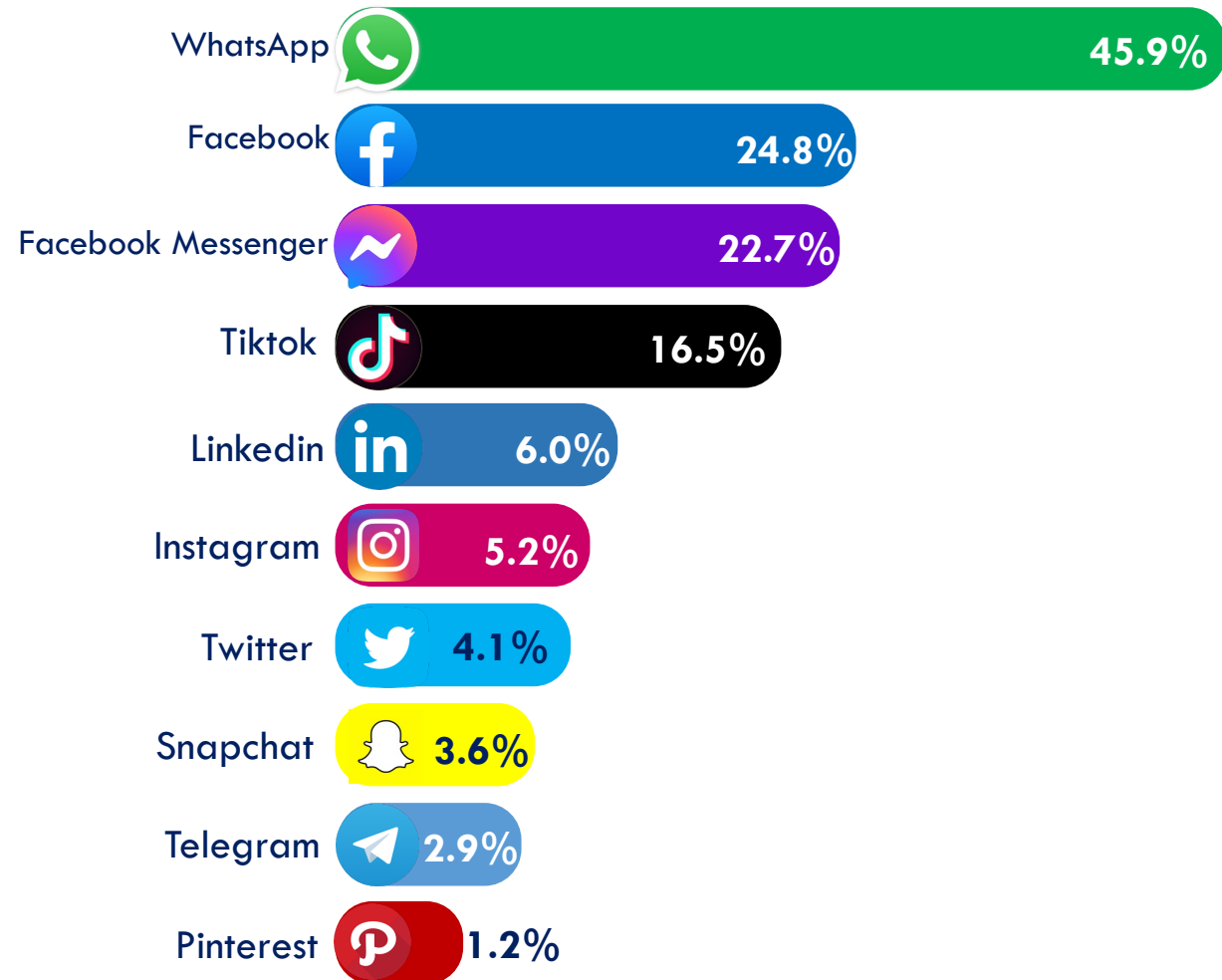
Source: similarweb.com

# Popular Social Media Sites (2022)

# 45.9%

of internet subscribers use WhatsApp

**High WhatsApp usage is linked to the smartphone revolution which has provided a smooth pathway for social media networking and interactions.**



Base: 48,367,704 internet users

# Top Searches in 2022 (General)

In the year 2022, Kenyans looked for information about general elections, sports, education, health, sports, local and global politics.

1.



## IEBC Portal

Most Kenyans logged in to IEBC portal to download 2022 General elections results.

6.



## Kenya Elections 2022

Kenyans searched new developments about 2022 General elections results.

2.



## World Cup 2022 Fixtures

Kenyans searched information about FIFA World Cup in Qatar played in Nov- Dec 2022

7.



## Pakakumi

Kenyans researched about Pakakumi and online social multiplayer game.

3.



## AFCON

2023 AFCON qualifying results and fixtures was the topic of interest.

8.



## Climate Change

UN climate change conference (COP27), climate implementation summit, in Egypt attracted most searches.

4.



## KNEC Portal

Kenyans logged into KNEC portal to check on KCSE and KCPE results.

9.



## COVID-19 Registry

Kenyans continued to search about COVID-19.

5.



## KUCCPS Portal

Kenyans were checking universities they/ their children had been shortlisted to join.

10.



## Russia Ukraine Conflict

Kenyans searched about the conflict about the fight between the two countries.



# Top 10 Online trending Kenyan personalities in 2022

**Politicians were the top trending personalities on the online platform in the year 2022.**

1

## Rigathi Gachagua

DP Rigathi Gachagua was the most searched personality on Google in 2022, after he was announced as President William Ruto running mate



2

## Martha Karua

NARC Kenya party leader Martha Karua online popularity spiked after she was announced Raila's Odinga as his running mate.



3

## George Wajackoyah

Popularity rose when he announced his presidential candidature under Roots Party, riding on legalizing marijuana.



4

## Johnson Sakaja

He trended when claims emerged that he had no genuine university degree to vie for Nairobi gubernatorial position.



5

## Kalonzo Musyoka

His delayed announcement on which political side (Azimio of Kenya Kwanza) he was supporting contributed to this trend.



6.

Ezekiel Machogu

7.

Juliana Cherera

8.

Wafula Chebukati

9.

Sabina Chege

10.

Ferdinand Omanyala

## What is...?

1. What is innovative gardening?
2. What is form 34A?
3. What is happening in Ukraine?
4. What is NATO?
5. What is freemason?
6. What is GMO?
7. What is state capture?
8. What is subsidy?
9. What is opaque?
10. What is coding?

## How to...?

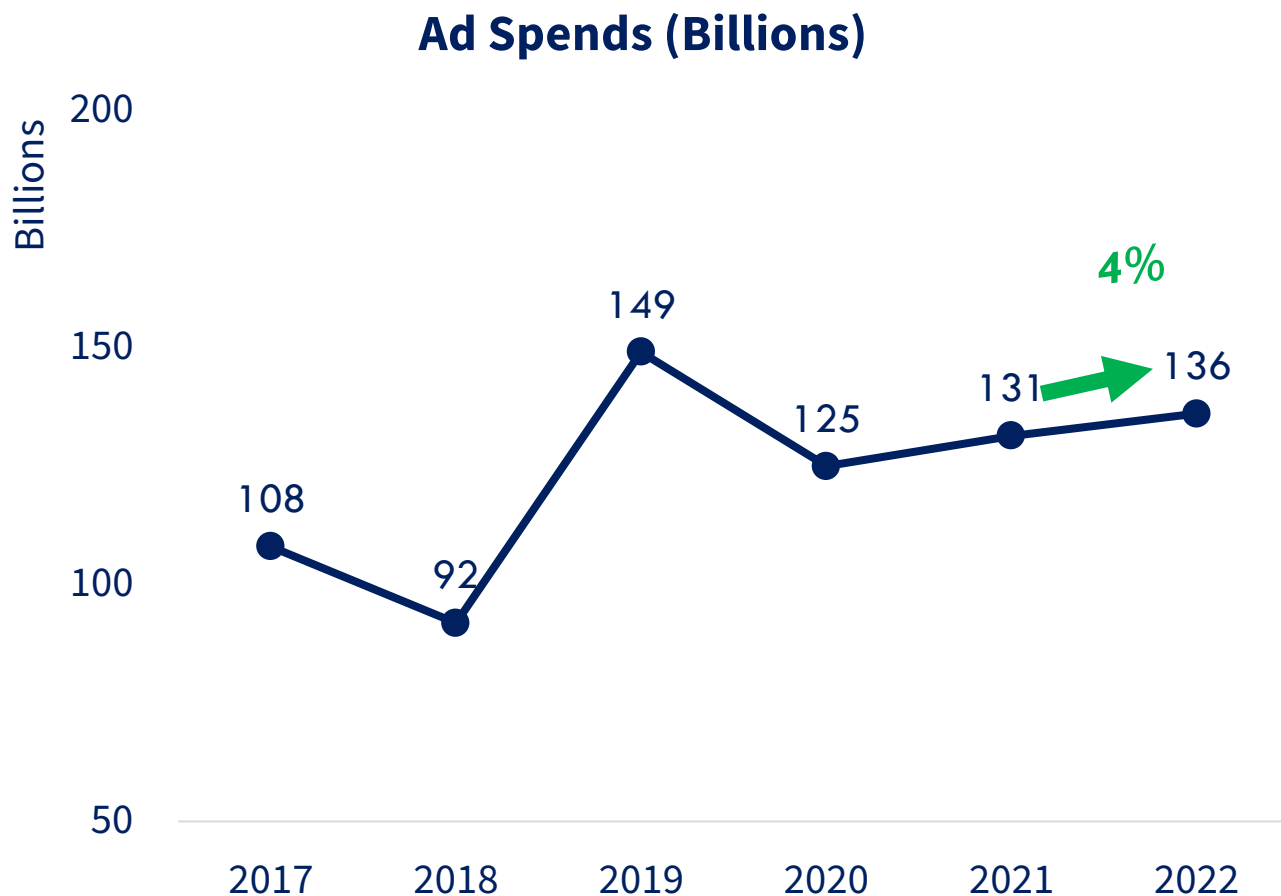
1. How to update Safaricom line
2. How to check KCSE results
3. How to check KCPE results
4. How to check my polling station online
5. how to apply for a passport in Kenya
6. How to buy KPLC tokens
7. How to make a marionette
8. How to register Airtel line
9. How to make a kite
10. How to download form one admission letter



# Advertising Trends 2022



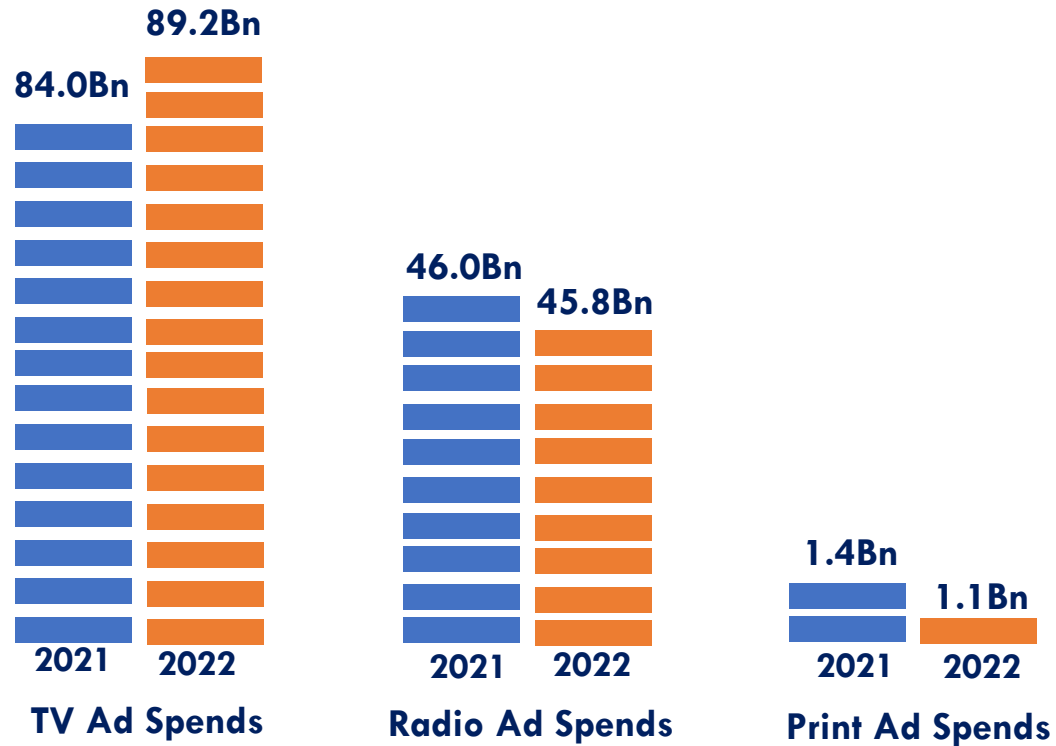
# Year on Year Ad Spends



**Overall advertising expenditure in 2022 increased by 4% compared to 2021, due increased expenditure by Betting & Gambling, Media, Finance and Communication industries (25%, 34%, 23% and 11% respectively).**

# Ad Spends by Media

## Overall Ad Spends by Medium



Advertising expenditure on TV in 2022 rose by 6% attributed to increased budgets by Media and Betting and Gambling (constituted for 22% ad spends share on this medium).

Print and radio advertising expenditure in 2022 declined by 25% and 0.3% respectively.

# Ad Spends by Industry

Sector's ad spends rose by 25%;  
BetWay Betting Co. and Lotto were the  
top spenders, with a shares of 38%  
and 15% respectively.  
76% of the industry's expenditure in  
2022 was on TV



**Betting & Gambling**

**18.8%**



**Media**

**17.6%**



**Finance**

**12.2%**



**Communication**

**10.7%**



**Beverages**

**7.6%**



**Personal Care**

**4.4%**



**Shopping**

**3.4%**



**Education**

**3.1%**

**Society**

**3%**

**Household**

**3%**

Industry's ad expenditure rose by  
34%, due to increased expenditure  
by MultiChoice which accounted for  
64% of the spends in 2022.

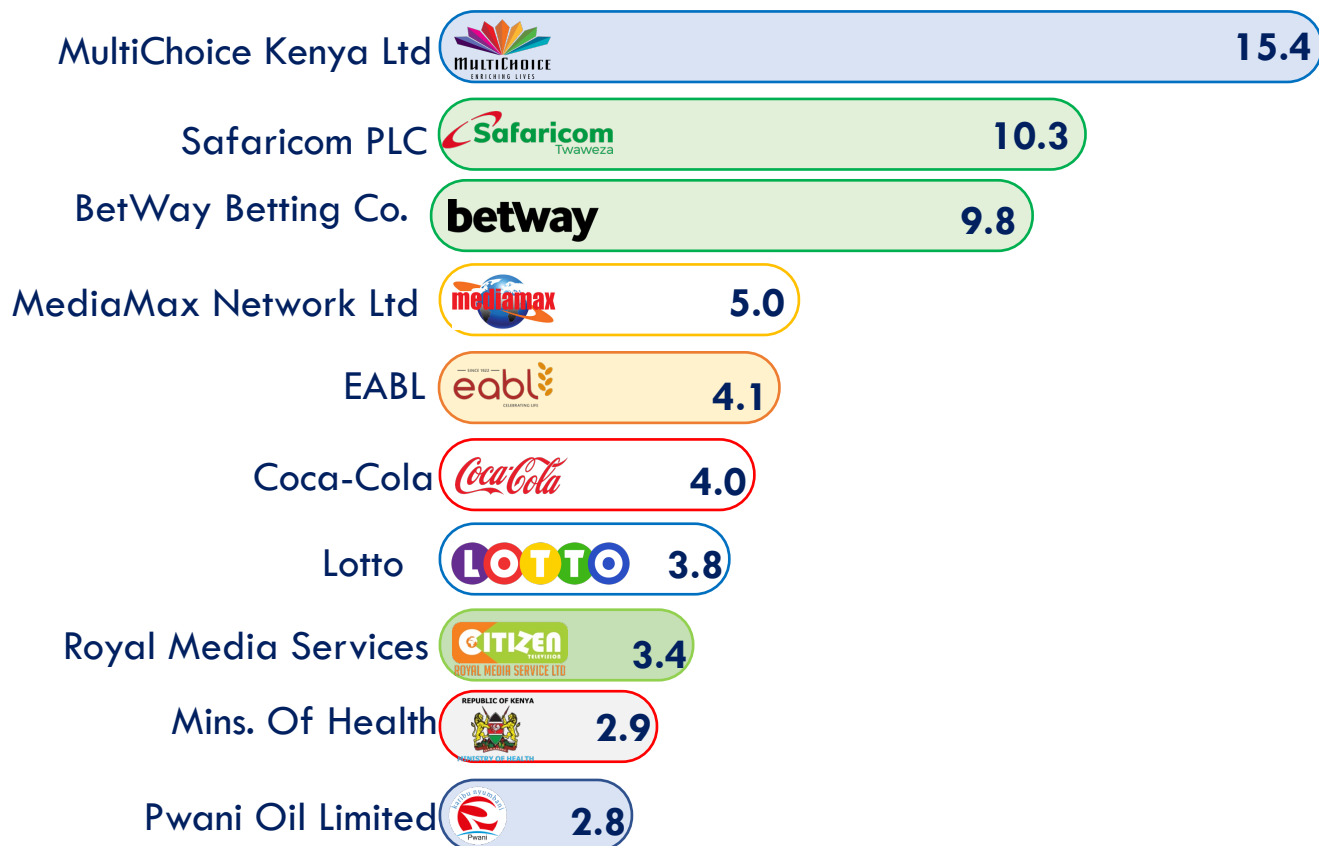
EABL and Coca-Cola were the  
top spenders in this sector with  
SOV of 40% and 38%  
respectively.

Safaricom PLC contributed for  
slightly over half (51% share),  
of this industry's ad spends.

**Base: KSh.136 Billion**

# Top Spenders

## Top 10 Spenders in 2022 (Billions)



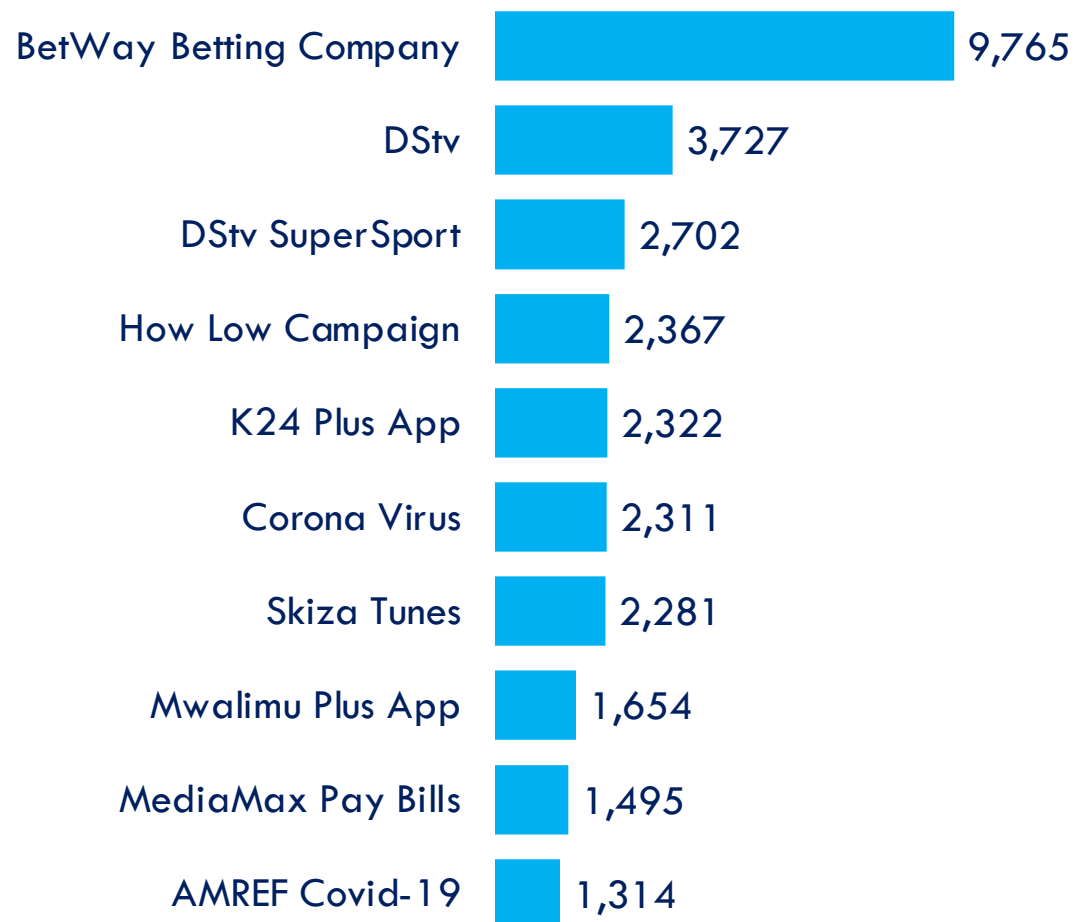
**MultiChoice Ke. increased advertising budget in 2022 (11 % rise) was targeted at pushing promotional campaigns ahead of FIFA World Cup and other major sports events.**

**Safaricom constituted for 8% of overall media advertising expenditure in 2022. 35% rise in the firm's ad budget was linked to expenditure on "Safaricom & MoH COVID-19" Awareness, Safaricom Bonga For Food and "Safaricom Sim Registration" campaigns.**



# Top Campaigns

## Top 10 Campaigns (Millions)



**Media and Betting campaigns dominated top 10 list.**

**A bigger chunk of Betting Company advertising spends were on DStv channels.**

# Radio ad spends by Stations (2022)

Station	Ad Volume	Airtime (min)	Ad Spends (Billions)
Kameme FM	90,177	62,223	3.8
Milele FM	61,684	41,027	3.0
Kass FM	54,869	50,853	4.8
Meru FM	50,871	31,918	1.6
Citizen Radio	48,542	32,112	2.2
Emoo FM	43,052	30,434	1.5
Inooro FM	42,981	35,965	2.0
Radio Maisha	36,406	27,016	2.8
Radio Jambo	35,536	51,831	3.3
Ramogi FM	33,270	23,408	1.3
Egesa FM	32,990	30,506	1.4
Classic 105	32,761	26,595	1.8
Capital FM	30,876	18,251	1.0
Radio Nam Lolwe	28,973	28,648	0.4
Muuga FM	26,568	17,664	0.8
Others	371,789	355,979	14.3
<b>Total</b>	<b>1,021,345</b>	<b>864,430</b>	<b>45.8</b>

**Finance and Betting & Gambling were the most active sectors on radio in 2022.**

**Kameme FM was the busiest radio station in 2022 with an average of 250 adverts per day; Betting & Gambling and Finance sectors pushed most of the activities on the stations (20% and 19% ad volume respectively)**

# TV ad spends by Channel (2022)

Channel	Ad Volume	Airtime (min)	Ad Spends (Billions)
Citizen TV	115,952	45,260	9.9
K24	69,431	48,489	8.2
Lolwe TV	67,642	40,169	1.9
NTV	53,195	18,853	3.6
KTN Home	52,435	25,444	5.5
Inooro TV	51,701	27,742	4.6
Mutongoi TV	46,631	20,591	3.9
Kameme TV	35,792	25,876	5.3
KISS TV	34,773	17,236	4.1
Sign Tv	34,138	36,350	2.8
Ramogi TV	22,661	29,566	2.4
Horizon TV	21,052	11,368	2.5
TV 47	20,904	13,753	2.6
KTN News	14,237	10,075	1.5
Others	303,803	202,565	30.4
<b>Grand Total</b>	<b>944,347</b>	<b>573,337</b>	<b>89.2</b>

**Media was the top sector on TV in 2022 with ad volume share of 61%.**

**Citizen TV was the most active channel in 2022 airing an average of 318 adverts per day: Finance, Personal Care and Communication were the top three industries on Citizen TV contributing 48% cumulatively of the ad volume in the year.**

# Print ad spends by publication

Publication	Ad Volume	Ad Spends
Daily Nation	1,603	344,858,454
The Standard	1,057	322,443,870
The People Daily	706	153,294,340
The Star	178	38,746,710
Saturday Nation	143	28,890,060
Business Daily	129	30,264,868
The East African	129	26,027,285
Sunday Nation	120	35,101,630
Standard on Saturday	116	28,186,890
Sunday Standard	109	34,146,280
The Nairobiian	107	19,227,378
Taifa Leo	57	7,851,310
My Gov	47	9,812,168
Others	54	6,396,300
Grand Total	4,555	1,085,247,543

**Government ministries/ agencies were the top advertisers on print constituting for 58% of the adverts.**

**Daily Nation dedicated most space to advertising than any other publication in the year.**



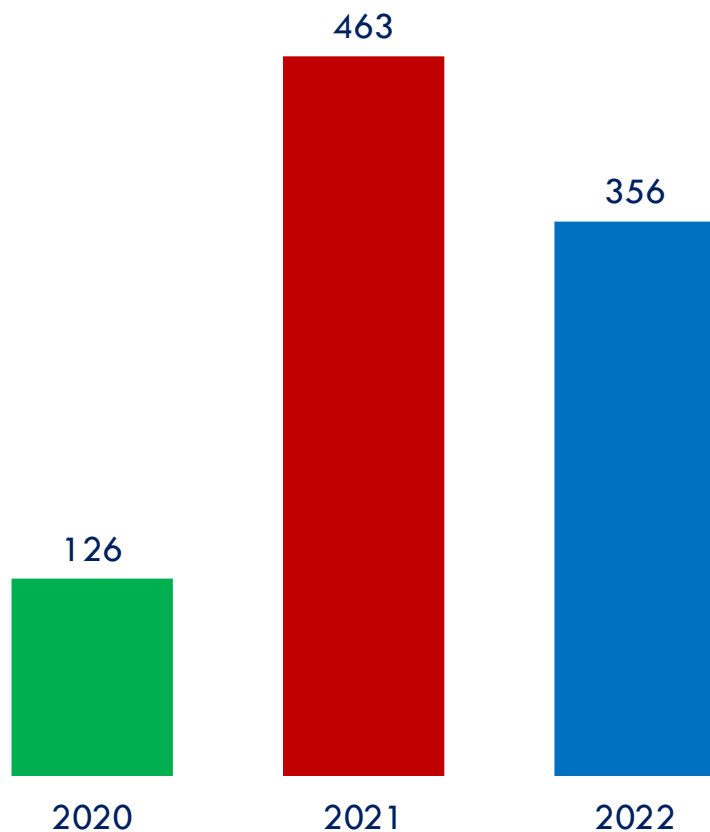
# OOH Advertising Expenditure



# OOH Ad Spends by Year

Year on Year Ad Spends (Millions)

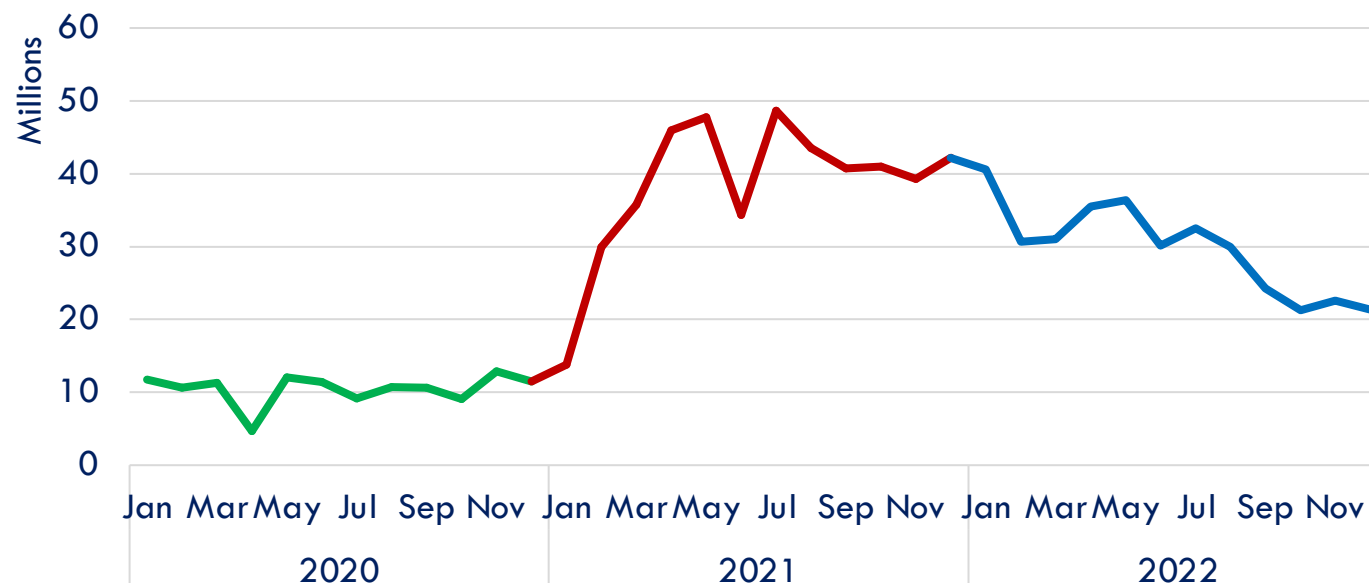
■ 2020 ■ 2021 ■ 2022



Out of Home (OOH) advertising expenditure in 2022 declined by 23% compared to 2021; 2022 being an electioneering year most firms were cautious on OOH advertising.

Billboards were the most utilized OOH asset owing to their vast distribution network across the country.

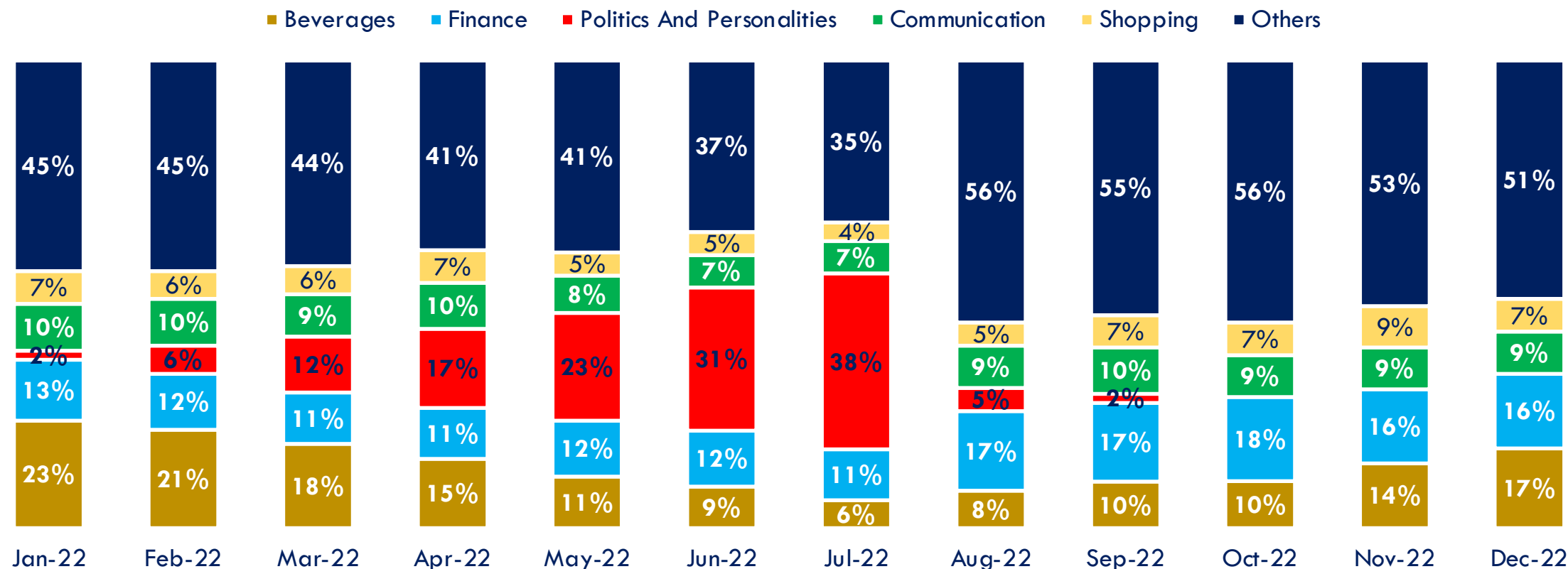
Ad Spends by Month



# OOH Trended Industries Ad Spends (2022)

In the run up to the election's EABL's influence in the OOH space shrunk as politicians controlled the space but in the last quarter EABL is slowly gaining its space as the dominant sector player with its wide array of assets reaching people across the country.

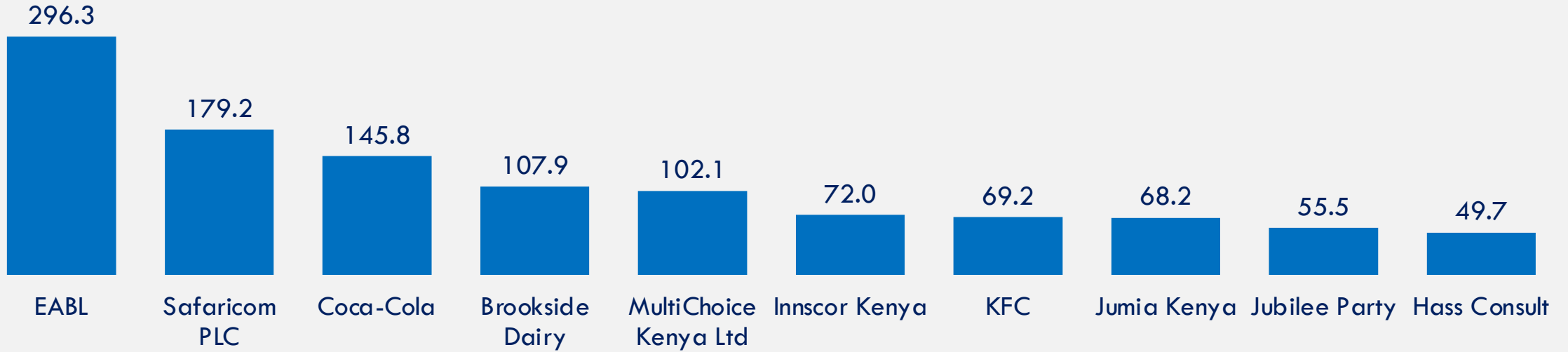
## Industry Ad Spends by Month



# OOH Top Spenders (2022)

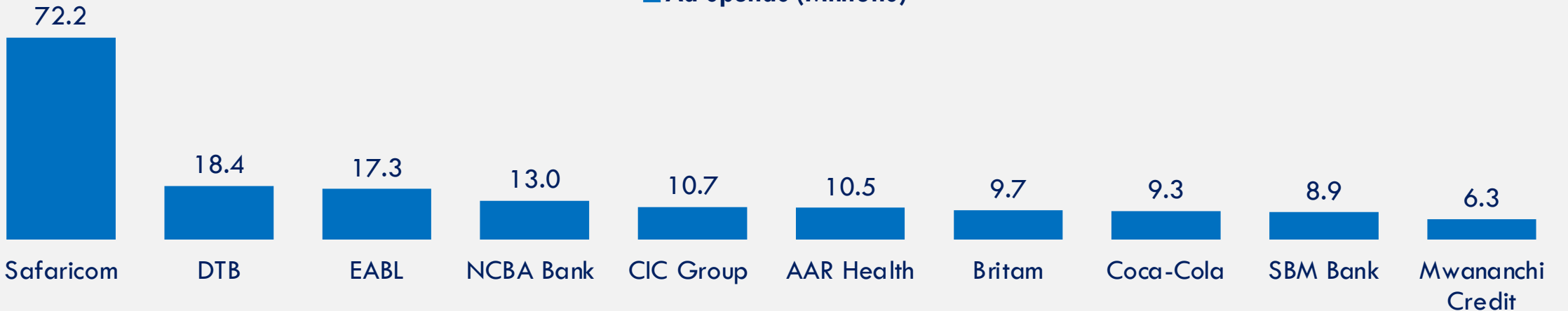
## Large Format

■ Ad spends (Millions)



## Small Format

■ Ad spends (Millions)



Small formats are largely dominated by Street poles, which are a unique asset attributed to their multi faceted feature which provides visibility to both inbound and outbound traffic.



# Thank You

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